



► Polycom® Open Telepresence  
Experience™ (OTX™) 300  
User Guide



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# About this Guide

This guide introduces you to the Polycom Open Telepresence Experience (OTX) 300, explains how to use the Touch Panel, describes what you can expect to see on the displays during meetings in the OTX room, and provides general guidelines for conducting successful meetings.

This guide is intended for all users of the Polycom OTX 300, software version 2.7.

For quick reference information about the OTX, refer to the *Quick Tips for Polycom Open Telepresence Experience (OTX) 300*. This document describes how to use the Touch Panel to perform common user tasks, such as making and ending calls, controlling audio, and sharing content, as well as how to make calls using Meeting Composer.

Additional Polycom documentation is available at the Polycom web site, <http://www.polycom.com/support/video/index.html>.

For support or service, please contact your Polycom distributor or go to Polycom Support at <http://support.polycom.com>.



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# Introducing the OTX 300

Imagine walking into a comfortable professional meeting environment, taking a seat, and starting a conversation with your counterpart located across the world. Without any technology in the way, you can focus on the business at hand. Welcome to telepresence conferencing with the Polycom Open Telepresence Experience (OTX).

The OTX offers Polycom's Ultimate High Definition video with true-to-life people dimensions. This real-size video, coupled with Polycom's superb audio, will enable you to pick up minute facial expressions and gestures, and clearly hear every bit of conversation. Before long, the extraordinary realism will make you feel as if your colleagues were sitting across the table from you rather than being miles away.



## Key Features and Benefits

The key features and benefits of the Polycom OTX 300 include:

Feature	Benefit
Appealing design	The OTX room has been designed with a fresh look and feel that provides broader global appeal and a more consistent meeting experience. Critical tools and connections are within easy reach. Additionally, with the optional Complete Experience Kit, which includes the rear wall and lighting, you can enhance your telepresence experience with a finished look and bold lighting.
Interoperability	The OTX is interoperable with all standards-based video conferencing products, other telepresence solutions (such as the Polycom RealPresence™ Experience High Definition (RPX™ HD) 400 and 200 Series, the Polycom Telepresence Experience® High Definition (TPX® HD) 306M, the Polycom Architected Telepresence Experience™ (ATX™) 300, as well as traditional video conferencing products (such as Polycom HDX™ solutions).
High resolution content monitors	Large 21.5-inch high definition tabletop content monitors rise automatically on motorized lifts when content is available for viewing. When not in use, they retract for expanded tabletop usability.
Optimized bandwidth	The Polycom OTX leverages the power of H.264 High Profile, a standards-based video compression technology that delivers full HD quality while lowering your bandwidth requirements by up to 50 percent.
Superior audio and video quality	Combining Polycom UltimateHD™ technology with Polycom's history of providing leading audio solutions, the OTX solution delivers superior visual quality and 22 kHz StereoSurround™ audio. When meeting participants can pick up every nuance of a conversation, see facial expressions, make eye contact, and read body language, your organization can improve team communications and collaboration.
High definition video quality	Polycom HDX and Ultimate HD video solutions enable you to experience the highest quality video possible on the large 65-inch LCD displays. The Polycom HDX codecs support 1080p at 30 fps and 720p at 60 fps.
Improved camera	Experience striking 1080p video resolution with Polycom EagleEye™ 1080p cameras. Their sharp focus and clear, crisp, natural colors provide the ultimate HD images.
Unobtrusive technology	With the cameras concealed, the microphones suspended from the ceiling, the sound system out of view, and a 10-inch color Touch Panel to control the conference, the technology is transparent and easy to use, so you can focus on your meeting.

Feature	Benefit
Color Touch Panel user interface	The tabletop Touch Panel offers the familiar Classic user interface as well as the Enhanced user interface. The Enhanced UI includes the Meeting Composer feature, which enables you to select multiple sites and then touch one button to initiate the call. This interface also allows you to browse both Local and Global directories for sites to call.
Polycom Conferencing for Microsoft® Outlook®	The Polycom Conferencing for Microsoft Outlook feature allows you to use the Touch Panel (with the Enhanced UI) to simply and easily view a list of scheduled meetings and join those meetings.
Multipoint capability	Multipoint capability provides you with the flexibility of connecting to multiple telepresence rooms as well as traditional video conferencing systems at the same time. Multipoint calls can be initiated by the Video Network Operations Center (VNOC) or they can be user initiated using the Meeting Composer feature.
Multi-purpose room	When not used for telepresence conferencing, the room can be used as a traditional conference room, maximizing the room's use for your organization.



# Using the Touch Panel

The Touch Panel is your interface to the Polycom Open Telepresence Experience. It enables you to place video and audio calls, hang up calls, control the audio, and perform other telepresence conferencing tasks. The Touch Panel is located on the table within easy reach of the center seats.



If your organization has signed up for Video Network Operations Center (VNOC) services, the VNOC may handle many or all of the telepresence conferencing tasks for you. If so, you may not need to use the Touch Panel.

## About the Enhanced and Classic User Interfaces

The Touch Panel is available with two different interfaces: the Enhanced UI and the Classic UI.

- **Enhanced UI:** Enables you to perform all of the basic tasks needed to participate in a telepresence conference, such as making calls, answering calls, hanging up, controlling audio, and sharing content. The Enhanced UI also provides access to additional calling functionality, such as Meeting Composer, Polycom Conferencing for Outlook, and advanced directory searching.
- **Classic UI:** Enables you to perform the same basic conferencing tasks as the Enhanced UI, such as making and answering calls and sharing content. The Classic UI, however, does not offer Meeting Composer and other advanced calling features.

The installer sets the UI at the time of installation; however, your administrator or your VNOC provider can change it if needed.

With both the Enhanced UI and the Classic UI, you can expect the Touch Panel buttons to behave in this way:

- Whenever you press a button, the Touch Panel will beep.
- Most buttons on the Touch Panel will either immediately visually depress or change color when touched. If a button indicates a state (such as mute), it may take up to a second for the button to visually indicate the changed

state. If the response time is consistently longer than this or if you receive no response, contact the Help Desk as described in the [Getting Help](#) section on page [2-31](#).

## Accessing the Home Screen

The first screen you typically see on the Touch Panel is the Start screen:



**Figure 2-1** Start Screen

To access the Home screen from the Start screen:

>> Touch **Start**.

## Enhanced User Interface

The Home screen for the Enhanced UI provides you with access to the buttons you typically use during a telepresence conference. For example, you can use the Home screen to place speed dial calls, change the volume, and view the call indicators.



**Figure 2-2** Home Screen — Enhanced UI (Not in a Call)

Note that the Home screen you see will differ from the one shown above depending on which Speed Dial buttons your administrator has set up.

To access the Home screen from any other screen, simply touch the Polycom button.

## Classic User Interface

The Home screen for the Classic UI provides you with access to the buttons you typically use during a telepresence conference. For example, you can use the Home screen to place speed dial calls, change the volume, and view the call indicators.



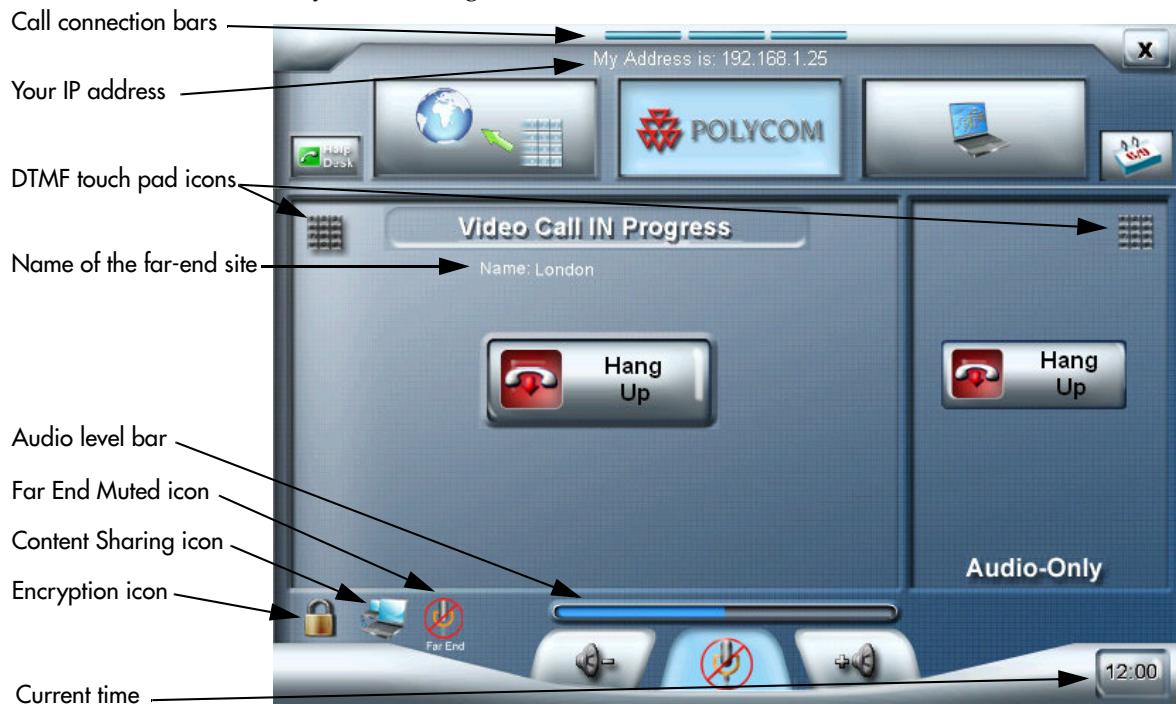
**Figure 2-3** Home Screen — Classic UI (Not in a Call)

Note that the Home screen you see will differ from the one shown above depending on which Speed Dial buttons your administrator has set up.

To access the Home screen from any other screen, simply touch the **Polycom** button.

## Understanding the Touch Panel Indicators

When you are in a call, the Touch Panel Home screen displays information you may need during the call.



**Figure 2-4** Home Screen — Enhanced UI (In a Call)

This is what you can expect to see on the Home screen when you are in a call:

- Call connection bars at the top of the screen light up to show you that you are connected to another video conferencing system:
  - All three indicators light up when you are connected to an OTX 300, a Polycom RPX HD 400 Series, a Polycom TPX HD 306M, or a multipoint call.
  - The left and center indicators light up when you are connected to a Polycom RPX HD 200 Series or a Polycom TPX HD 204 Series.
  - Only the center indicator lights up when you are connected to a traditional (standalone) video conferencing system.
- Your IP address is displayed on the screen.
- The name of the far-end site is displayed on the screen.
- A horizontal bar shows the audio level.
- The current time is displayed.

- If the call is not encrypted, the  Encryption icon appears unlocked; if the call is encrypted, the icon will appear locked.
- If the far end is sharing content, the  Content Sharing icon lights up. Note that this icon appears along the left side of the screen on the Classic UI.
- If the far end is muted, the  Far End Muted icon lights up. Note that this icon appears along the left side of the screen on the Classic UI.
- If you dial in to a multipoint call, a touch pad automatically appears so that you can enter the conference code or password. The touch pad sends DTMF tones. If you want to manually display the touch pad, touch the DTMF touch pad icon.



**Figure 2-5 DTMF Touch Pad**

- The optional **Close Up** and **Wide Shot** camera view buttons appear if your system administrator has set up this option.



**Figure 2-6** Home Screen: In a Call (with Camera Views Buttons)

- Touch **Close Up** if you want the near site camera to zoom in.
- Touch **Wide Shot** if you want the near site cameras to fully zoom out.

## Calling with the Enhanced UI

This section describes how to use the Enhanced UI to:

- Make and hang up speed dial calls
- Use the Meeting Composer feature to first select the sites to call and then place and hang up the calls
- Use the Polycom Conferencing for Outlook feature to view the available meetings, join a scheduled meeting, and leave a meeting

## Making and Hanging Up Speed Dial Calls

To enable you to speed dial calls, your system administrator must first set up the speed dial numbers for your site. Each of these speed dial numbers will correspond to a Speed Dial button on the Home screen. The Speed Dial buttons can be set up to call traditional (standalone) video conferencing systems, Immersive Telepresence sites, audio-only sites, or multiple sites at one time.

If you want to add or remove any of the video or audio Speed Dial buttons on your Touch Panel, contact your system administrator. Your system administrator can refer to the *Polycom Immersive Telepresence (ITP) Administrator's Guide* for information about how to change the Speed Dial buttons.

### Speed Dialing Calls

#### Speed Dialing Video Calls

**To speed dial a video call when you are using the Enhanced UI:**

- 1 Touch  Polycom.

The Home screen for the Enhanced UI appears as shown in [Figure 2-2](#) on [page 2-3](#).

- 2 Touch the Speed Dial button that corresponds to the site you want to call. For example, if you often call a site in Boston, you might see a Speed Dial button called "Boston". You can simply touch that button to place a call to that site.

If more than nine speed dial numbers have been set up for your site, touch  Previous Page or  Next Page to view the additional Speed Dial buttons.

#### Speed Dialing Audio Calls

**To speed dial an audio call when you are using the Enhanced UI:**

- 1 If you are not on the Home screen, touch  Polycom.

The Home screen for the Enhanced UI appears as shown in [Figure 2-2](#) on [page 2-3](#).

- 2 Touch the audio Speed Dial button that corresponds to the telephone number you want to call. For example, if you often call the CEO's cell phone, you might see an audio Speed Dial button called "CEO Cell". You can simply touch that button to place a call to that number.



If you touch the  **Help Desk** button when an audio call is connected, the system must hang up the audio call in order to place the help call. A message informs you of this before hanging up the audio call. For more information about placing help calls, refer to [Getting Help](#) on page 2-31.

## Hanging Up Calls

If you are on a video call and an audio call concurrently, you must hang up the calls separately. This section describes how to hang up both types of calls.

### Hanging Up Video Calls

#### To hang up a video call:

- 1 If the  **Hang Up** button is not visible on your screen, touch  **Polycom**.
- 2 Touch the  **Hang Up** button on the left side of the screen (as shown in [Figure 2-4](#) on page 2-5).

The message "The call has ended" appears on the screen.

### Hanging Up Audio Calls

#### To hang up an audio call:

- 1 If the  **Hang Up** button is not visible on your screen, touch  **Polycom**.
- 2 Touch the  **Hang Up** button on the right (Audio-Only) side of the screen (as shown in [Figure 2-4](#) on page 2-5).

## Making Calls Using Meeting Composer

Meeting Composer enables you to easily place calls to multiple sites or to Immersive Telepresence sites (which have more than one codec). You can select the sites you want to call by using manual dial, speed dial, the Local or Global address book, or by searching.

Even if you want to call a traditional (standalone) video conferencing system or an audio-only site, you can use Meeting Composer to manually dial that site or to find that site in the address book.

Meeting Composer is available only with the Enhanced UI. If you are using the Classic UI, refer to [Calling with the Classic UI](#) on page 2-25.



Depending on how your system administrator has configured your system, some of the features described in this section (such as multipoint calling) may not be available.

For information about how your system is configured, contact your system administrator.

**Figure 2-7** shows the Meeting Composer screen. The left side of the screen enables you to select the sites you want to call. When you select a site, that site's name moves to the Conference List, which is on the right side of the screen. When the names of all the sites you want to call are listed in the Conference List, you can place the call simply by touching the **Connect** button. Meeting Composer will then automatically connect to the multiple sites.



**Figure 2-7** Meeting Composer Screen — Enhanced UI

When using Meeting Composer:

- You can select up to 30 sites to dial at once.
- After the conference has started, you can add or drop sites from the call. When adding sites, the maximum number you can add is determined by the available resources on the Polycom RMX™.

- Refer to the following table for information about the site icons on the Meeting Composer screen.

Site Type	Appearance of icon on left side of screen	Appearance of icon on right side of screen before conference has started	Appearance of icon on right side of screen once conference has started
Video (RPX, OTX, TPX, and ATX telepresence sites as well as H.323 and SIP video sites)			when site is connecting when site is connected when site is disconnected
Audio-only (Plain Old Telephone System (POTS) sites)			when site is connecting when site is connected when site is disconnected
Multisite (sites that consist of multiple video and audio-only sites)			The icon for each individual video site and audio site appears as described above.

## Selecting Sites Using Meeting Composer

From the left side of the Meeting Composer screen, you can select the sites you want to call. This section describes the various methods by which you can select sites, including:

- Manual dial
- Speed dial
- Address book
- Search

### Selecting a Site Using Manual Dial

#### To select a site using manual dial:

- Touch Meeting Composer.

2 Touch  **Number Pad**.

The Meeting Composer Number Pad view appears.



**Figure 2-8** Meeting Composer Number Pad View — Enhanced UI

3 Touch **Video** Video or **Audio** Audio.

4 Using the number pad, enter the video or phone number, IP address, or E.164 extension for the site.

If you make a mistake while dialing, touch **Clear** Clear to remove the entire entry or touch **<-** Backspace to remove one character at a time.

5 Touch **Add** Add to add the number to the list of sites you want to call.

The number will appear in the Conference List on the right side of the Meeting Composer screen.

### Selecting a Site Using Speed Dial

You can select video speed dials using the method described in this section. Audio-only speed dials are not available.

#### To select a site using speed dial:

1 Touch  **Meeting Composer**.

**2** Touch  **Speed Dial.**

The Meeting Composer Speed Dial view appears.



**Figure 2-9** Meeting Composer Speed Dial View — Enhanced UI

Note that the icons on the Meeting Composer Speed Dial buttons display a right arrow to indicate that using the button will add the site to the Conference List on the right side of the screen.



If the icon on the Speed Dial button displays a right arrow along with a plus sign, the speed dial site is a multipoint site.



**3** Touch the Speed Dial button that corresponds to the site that you want to add to the list of sites to call. For example, if you often call a site in Boston, you might see a Speed Dial button called "Boston". You can simply touch that button and it will appear in the Conference List on the right side of the Meeting Composer screen.

If more than nine speed dial numbers have been set up for your site, touch  **Previous Page** or  **Next Page** to view the additional Speed Dial buttons.

## Selecting a Site Using the Address Book

To enable you to select sites using the Local and Global address books, your system administrator must first configure the address books so that you can access them from your site.



If your system is not configured to use the Polycom Converged Management Application™ (CMA™), you will not have access to the Global address book.

For information about how your system is configured, contact your system administrator.

### To select a site using the address book:

- 1 Touch Meeting Composer.
- 2 Touch Address Book.

The Meeting Composer Address Book view appears.



**Figure 2-10** Meeting Composer Address Book View — Enhanced UI

- 3 Touch the Local or the Global address book.

The groups that belong to that address book are displayed on the left side of the Address Book view. Use the scroll bar to see the complete list of groups.

- 4 Touch the group to which the site belongs.

The members of that group are displayed on the right side of the Address Book view. Use the scroll bar to see the complete list of members.

- 5 Touch the name of the site that you want to add to the list of sites to call.

The name will appear in the Conference List on the right side of the Meeting Composer screen.

### Selecting a Site Using Search

To enable you to select sites using search, you must have access to the Local address book. For global searches, you must also have access to the Global address book. To access these address books, your system administrator must configure your system accordingly.



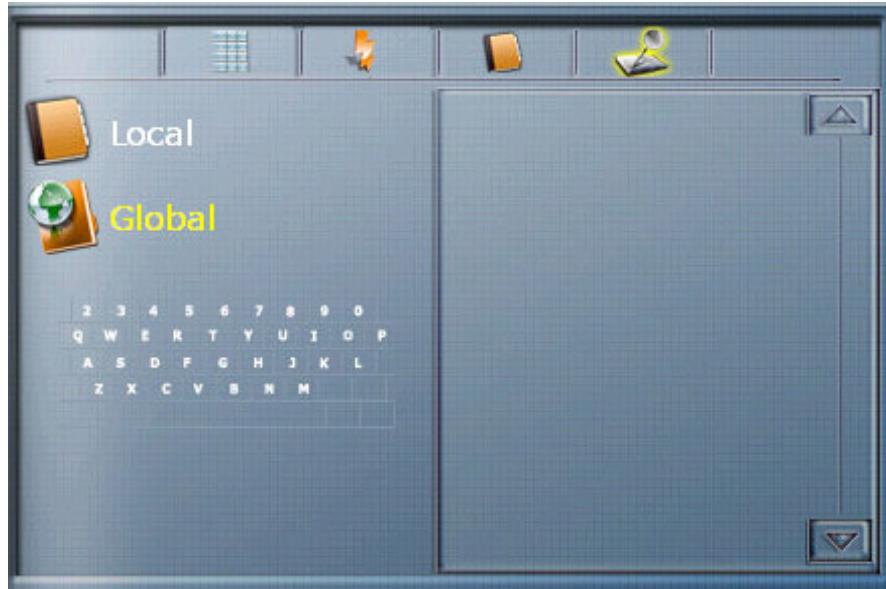
If your system is not configured to use the Polycom Converged Management Application (CMA), you will not have access to the Global address book.

For information about how your system is configured, contact your system administrator.

### To select a site using search:

- 1 Touch  **Meeting Composer**.
- 2 Touch  **Search**.

The Meeting Composer Search view appears.



**Figure 2-11** Meeting Composer Search View — Enhanced UI

- 3 Touch the  Local Local or the  Global Global address book.
- 4 Touch  Keyboard.

A keyboard is displayed on the full screen.



**Figure 2-12 Full Screen Keyboard — Enhanced UI**

- 5 Using the keyboard, enter any string of characters to search for the name of the site. (Partial strings are acceptable.)

Note that the system will not search numbers unless they are part of the site name. For example, if you enter "172", any sites with IP addresses starting with "172" will not be retrieved; however, a site with the name "172 Boston Street" will be retrieved.

- 6 Touch Enter.

The keyboard disappears and the sites that match the criteria you entered in the previous step appear on the right side of the Search view. Use the scroll bar to see the complete list of sites.

- 7 Touch the name of the site that you want to add to the list of sites to call.

The name will appear in the Conference List on the right side of the Meeting Composer screen.

- 8 If you selected the Local address book and would like to continue your search in the Global address book or vice versa, repeat steps 3 through 6.

The matching sites will continue to display on the screen so you can toggle between the Local and Global results.

## Making and Hanging Up Calls Using Meeting Composer

Once you have added the sites you want to call to the Conference List on the right side of the Meeting Composer screen, you can make the call to those sites as described in this section.

### Making and Hanging Up a Multipoint Call

If your system is configured to use the Polycom RMX, you can make a call to multiple sites as well as to telepresence sites. You can select up to 30 sites to dial at once. After the conference has started, you can add additional sites or drop sites. The maximum number you can add is determined by the available resources on the Polycom RMX.

Note that if you create a Conference List of only one site and that site is not a multipoint site or a SIP endpoint, the system will make the call as a point-to-point call without using the RMX.

#### To make and hang up a multipoint call:

- 1 Ensure that the sites listed in the Conference List include all the sites you want to call:
  - If you want to delete a site, simply touch that site's name in the list.
  - If you want to delete all the sites, touch the  Clear button.
  - If you want to add another site, refer to [Selecting Sites Using Meeting Composer](#) on page 2-11.



**Figure 2-13** Meeting Composer Conference List for a Multipoint Call — Enhanced UI (Not in a Call)

**2** Touch  **Connect**.

As the sites are connecting, status messages appear at the top of the Conference List. Each message is automatically cleared after five seconds.

Once the conference starts, the Conference List displays the list of sites in the conference as well as the  **Hang Up** button.

**3** You can then do the following:

- To drop a site from the conference, simply touch that site's name in the list.
- To end the conference, touch  **Hang Up**.

### Making and Hanging Up a Point-to-Point Plus Call

With point-to-point plus, you can make one video call and one audio call at the same time, you can add a video call to an ongoing audio call, or add an audio call to an ongoing video call.

#### To make and hang up a point-to-point plus call:

**1** Ensure that the sites listed in the Conference List include the sites you want to call.

- If you want to delete a site, simply touch that site's name in the list.
- If you want to delete both sites, touch the  **Clear** button.
- If you want to add another site, refer to [Selecting Sites Using Meeting Composer](#) on page 2-11.



**Figure 2-14** Meeting Composer Conference List for a Point-to-Point Plus Call — Enhanced UI

**2** Touch  **Connect**.

As the sites are connecting, status messages appear at the top of the Conference List. Each message is automatically cleared after five seconds.

Once the conference starts, the Conference List displays the video and audio **Hang Up** buttons as appropriate for the call.



**Figure 2-15** Meeting Composer Hang Up Screen for a Point-to-Point Call — Enhanced UI

**3** You can then do the following:

- To drop the video call from the conference, touch  **Hang Up Video**.
- To drop the audio call from the conference, touch  **Hang Up Audio**.

## Using Polycom Conferencing for Outlook

The Polycom Conferencing for Outlook feature enables you to use the Enhanced UI on the Touch Panel to view a list of scheduled meetings and to join those meetings. To use this feature, your system administrator must configure your system to connect to the Microsoft Exchange Server, as well as install the Polycom Conferencing Add-In for Microsoft Outlook at your site.

Your system administrator can refer to the *Polycom Immersive Telepresence (ITP) Administrator's Guide* and the *Polycom Immersive Telepresence Deployment Guide* for information about how to configure your system for using Polycom Conferencing for Outlook.



If you join a meeting using Polycom Conferencing for Outlook, Meeting Composer will be disabled. You cannot use these two features simultaneously.

## Joining a Meeting Using Polycom Conferencing for Outlook

### To join a meeting using Polycom Conferencing for Outlook:

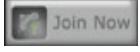
- 1 Touch Calendar on the upper right corner of the Home screen.



**Figure 2-16** Home Screen with Calendar Button

2 Touch the meeting you want to join from the list of meetings that appears on the right side of the screen.

- A  green icon appears to the left of available meetings.
- A  gray icon appears to the left of meetings that have already occurred.

Once you touch a valid meeting to join, details about that meeting will display on the left side of the screen and the  **Join Now** button will change from gray to green.



**Figure 2-17** Polycom Conferencing for Outlook Screen with Meeting List

3 Touch  **Join Now**.

Your OTX 300 will then automatically connect to the meeting you selected.

Once you have connected, the  **Join Now** button will change to a  **Leave Meeting** button.



**Figure 2-18** Polycom Conferencing for Outlook Screen with Meeting Details

## Responding to Meeting Reminders

When a meeting is about to start, the Polycom Conferencing for Outlook screen displays a meeting reminder on the right side of the screen.

### To respond to meeting reminders:

- Press Yes to join the meeting.
- Press No to cancel the reminder.



**Figure 2-19** Polycom Conferencing for Outlook Screen with Meeting Reminder

## Leaving a Meeting Using Polycom Conferencing for Outlook

**To leave a meeting using Polycom Conferencing for Outlook:**

>> Touch  Leave Meeting.

If you select another available meeting, the  Join Now button will reappear.



**Figure 2-20** Polycom Conferencing for Outlook Screen with Meeting in Progress



If you are currently in a meeting but would like to join a different meeting, select the meeting you want to join and touch  Join Now. The OTX 300 will disconnect you from the first call and connect you to the meeting you selected.

## Calling with the Classic UI

This section describes how to use the Classic UI to:

- Speed dial video and audio calls
- Manually dial video and audio calls
- Hang up video and audio calls

### Speed Dialing Calls

To enable you to speed dial calls, your system administrator must first set up the speed dial numbers for your site. Each of these speed dial numbers will correspond to a Speed Dial button on the Home screen. The Speed Dial buttons can also be set up to call traditional (standalone) video conferencing systems or audio-only sites.

With the Classic UI, you cannot initiate multipoint calls; therefore, Speed Dials cannot be set up to call Immersive Telepresence sites or multiple sites at one time. You can, however, join multipoint calls that have been initiated by other sites, or a VNOC or bridge can initiate the multipoint calls.

If you want to add or remove any of the video or audio Speed Dial buttons on your Touch Panel, contact your system administrator. Your system administrator can refer to the *Polycom Immersive Telepresence (ITP) Administrator's Guide* for information about how to change the Speed Dial buttons.

## Speed Dialing Video Calls

To speed dial a video call when you are using the Classic UI:

- 1 Touch  Polycom.

The Home screen for the Classic UI appears..



**Figure 2-21** Home Screen — Classic UI

Touch the video Speed Dial button that corresponds to the site you want to call. For example, if you often call a site in Boston, you might see a Speed Dial button called "Boston". You can simply touch that button to place a call to that site.

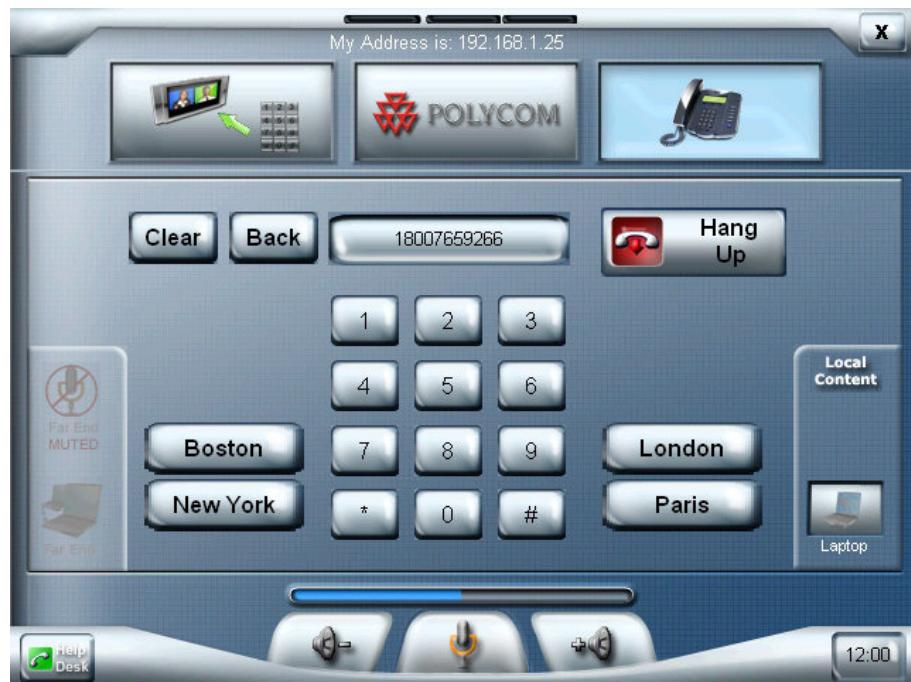
If more than nine speed dial numbers have been set up for your site, touch  Previous Page or  Next Page to view the additional Speed Dial buttons.

## Speed Dialing Audio Calls

To speed dial an audio call when you are using the Classic UI:

- 1 Touch  **Audio Dial**.

The Audio Dial screen for the Classic UI appears.



**Figure 2-22** Audio Dial Screen — Classic UI

- 2 Touch the audio Speed Dial button that corresponds to the telephone number you want to call. For example, if you often call the CEO's cell phone, you might see an audio Speed Dial button called "CEO Cell". You can simply touch that button to place a call to that number.



If you touch the  **Help Desk** button when an audio call is connected, the system must hang up the audio call in order to place the help call. A message informs you of this before hanging up the audio call. For more information about placing help calls, refer to [Getting Help](#) on page 2-31.

## Manually Dialing Calls

With the Classic UI, you can manually dial both video calls and audio calls.

### Manually Dialing Video Calls

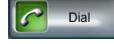
**To manually dial a video call when you are using the Classic UI:**

- 1 Touch  **Video Dial**.

The Video Dial screen for the Classic UI appears.



**Figure 2-23** Video Dial Screen — Classic UI

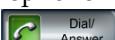
- 2 Enter the number of the site you want to call using the touch pad, and then touch  **Dial**.  
If you make a mistake while dialing, touch  **Back** to edit the number or touch  **Clear** to erase the number and start over.

## Manually Dialing Audio Calls

**To manually dial an audio call when you are using the Classic UI:**

- 1 Touch  **Audio Dial**.

The Audio Dial Screen for the Classic UI appears as shown in [Figure 2-22](#) on [page 2-27](#).

- 2 Enter the telephone number that you want to call using the touch pad and then touch  **Dial/Answer**.

To get an outside line, you should dial the number the same way you would dial an ordinary telephone in your organization. For example, some organizations require you to dial a 9 before the number.

If you make a mistake while dialing, touch  **Back** to edit the number or touch  **Clear** to erase the number and start over.



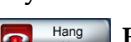
If you touch the  **Help Desk** button when an audio call is connected, the system must hang up the audio call in order to place the help call. A message informs you of this before hanging up the audio call. For more information about placing help calls, refer to [Getting Help](#) on [page 2-31](#).

## Hanging Up Calls

If you are on a video call and an audio call concurrently, you must hang up the calls separately. This section describes how to hang up both types of calls.

### Hanging Up Video Calls

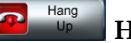
**To hang up a video call:**

- 1 If the  **Hang Up** button is not visible on your screen, touch  **Polycom**.
- 2 Touch the  **Hang Up** button on the center of the screen.

The message "The call has ended" appears on the screen.

### Hanging Up Audio Calls

**To hang up an audio call:**

- 1 If the  **Hang Up** button is not visible on your screen, touch  **Polycom**.
- 2 Touch the  **Hang Up** button on the center of the screen.

## Answering Calls

This section describes how to answer video or audio calls that you receive when in an OTX room.

### Answering Video Calls

When you receive a video call, you hear a ringing sound.

**To answer a video call:**

**>>** You do not have to do anything to answer the call. The call will be automatically answered by the OTX.

### Answering Audio Calls

When you receive an audio call, you hear a ringing sound and the Touch Panel automatically displays the Home screen for the Enhanced UI (shown in [Figure 2-2](#)) or the Audio Dial screen for the Classic UI (shown in [Figure 2-22](#)) so that you can easily answer the call.

**To answer an audio call:**

**>>** Touch  **Dial/Answer.**

## Controlling Audio

When you place a video call, the audio level defaults to the volume it was set at the last time the OTX was used. A horizontal bar on the Touch Panel shows the audio level. You can change the audio in these ways:

- During both video and audio calls, touch  **Volume Up** or  **Volume Down** to increase or decrease the sound you hear from the far end.
- During both video and audio calls, touch  **Mute** to mute or unmute the sound you are sending from your site.

If the far end is muted, the  Far End Muted icon appears on the Home screen.

## Getting Help

This section lists the error message that you may receive on the Touch Panel when you place a call that does not connect. It also describes how to contact the Help Desk whenever you need help with the OTX.

### Understanding Error Messages

If you make a call using the Touch Panel and the call does not connect, you will receive an error message. The following table describes these messages.

Error Message	Description
The call has ended.	Your site or the far end hung up the call.
The far end system rejected the call.	The far end is already in a call.
The far end could not be reached.	You called the wrong IP address or there is no network between your site and the dialed site.
The site you called could not be located.	Your site is registered to a gatekeeper, and the gatekeeper could not find the address or the alias.
Called Failed. Unknown error.	The reason for the call failure is not known.

### Calling the Help Desk

When you experience technical difficulties or have a question about the Polycom OTX, you can call the Help Desk.

The Help Desk number is configured by the system administrator. If your Help Desk button is not working, contact your system administrator.

If your organization has signed up for Video Network Operations Center (VNOC) services, you may also be able to call the Help Desk to request a room reservation, extend or cancel a meeting, or request other assistance. For more information about room requests, refer to [Reserving a Polycom OTX Room](#) on page 4-3.

#### To get help:

- 1 Touch  **Help Desk**.

Note that if your system administrator has set up an audio Speed Dial button with the Help Desk number, you can touch that Speed Dial button instead.

- 2** Touch the larger  **Help Desk** button that appears on the Touch Panel.

If your organization has signed up for VNOC services, you can also get help by calling the VNOC directly using the phone number provided by your organization.



If you touch  **Help Desk** when an audio call is connected, the system must hang up the audio call in order to place the help call. A message informs you of this before hanging up the audio call.

# Viewing People and Content

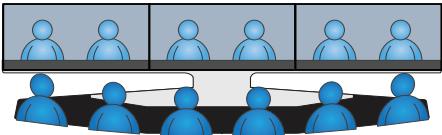
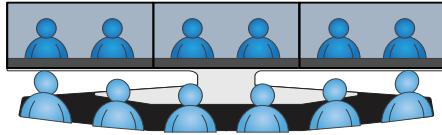
What can you expect to see on the displays during a telepresence conference in an OTX room? That depends on the type of system you are calling at the other site and whether your call is to one site (point-to-point) or multiple sites (multipoint). This chapter describes what you can expect to see in these various scenarios.

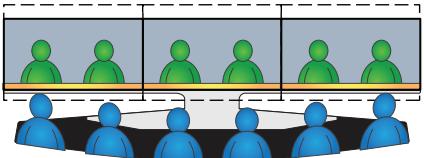
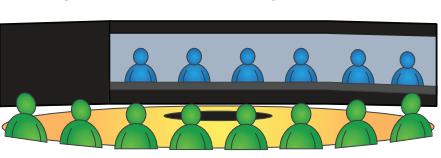
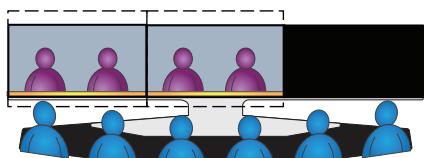
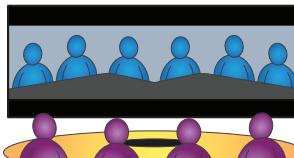
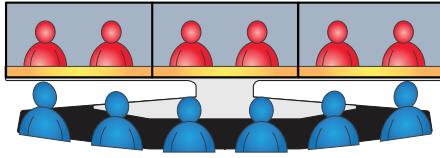
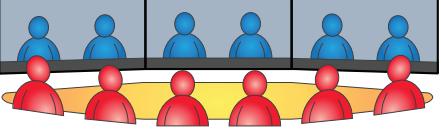
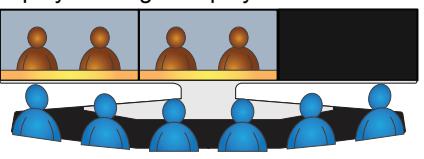
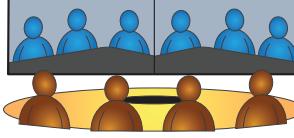
This chapter also describes how to bring content (such as slides, spreadsheets, or other documents) into the OTX room using a laptop or an optional document camera.

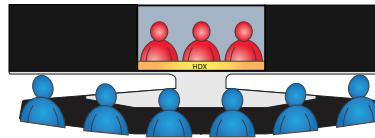
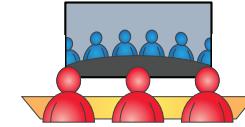
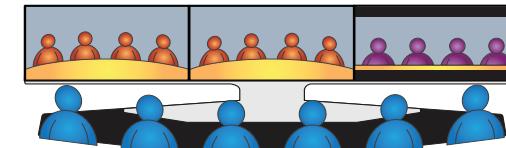
## Viewing People

Different types of video conferencing systems use a different number of cameras and displays. The OTX automatically adapts by adjusting its camera views depending on how many displays are at the far site.

The following table describes what you can expect to see when you view the people at the other sites during a telepresence conference in an OTX room.

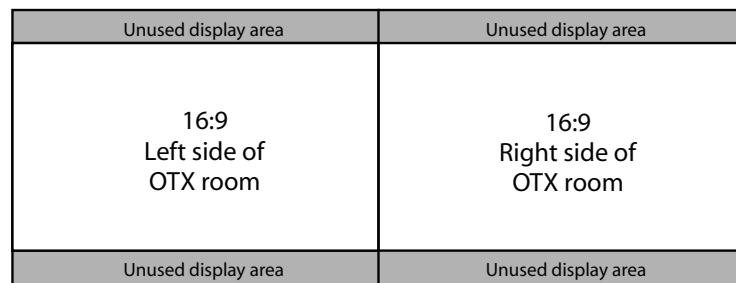
If you make a call between an...	And a/an...	This is what you will see in your OTX 300 room...	This is what the far site will see...
OTX 300	OTX 300	<p>The entire OTX 300 room. Two seats are shown on each display.</p> 	<p>The entire OTX 300 room. Two seats are shown on each display.</p> 

If you make a call between an...	And a/an...	This is what you will see in your OTX 300 room...	This is what the far site will see...
OTX 300	RPX HD 400 Series	The right six seats at the RPX HD main table. Two seats are shown on each display.  	The entire OTX 300 room. Two seats are shown on the far right display, on the center right display, and on the center left display. The far left display is blank.  
OTX 300	RPX HD 200 Series	The entire RPX HD Suite. Two seats are shown on the left display and two seats are shown on the center display. The right display is blank.  	The entire OTX 300 room. Three seats are shown on each display.  
OTX 300	TPX HD 306M or ATX 300	Two seats are shown on each display. For TPX, this is the entire room. For ATX, it depends on how the integrator set up the room.  	The entire OTX 300 room. Two seats are shown on each display.  
OTX 300	TPX HD 204M	The entire TPX HD 204M room. Two seats are shown on the center display and two seats are shown on the left display. The right display is blank.  	The entire OTX 300 room. Three seats are shown on each display.  

If you make a call between an...	And a/an...	This is what you will see in your OTX 300 room...	This is what the far site will see...
OTX 300	Traditional video conferencing system (such as Polycom HDX platforms)	The people at the far site on the center display. The left and right displays are blank. 	The center four seats and a portion of the left and right seats at OTX 300 table. 
OTX 300	More than one other site (multipoint call)	In multipoint calls, what you see and what the far site sees depends on a variety of factors including the number of sites in the call, the types of systems in the call, the cameras being used, and so forth. If a site is using the VNOC, the VNOC operator usually configures the layout so that every site sees all the other sites in the call. The following illustration shows what you would see in an OTX 300 room when in a multipoint call with two TPX HD 306M sites and one RPX HD 200 Series site. The left and center displays show the TPX HD 306M sites; the right display shows the RPX HD 200 site. 	

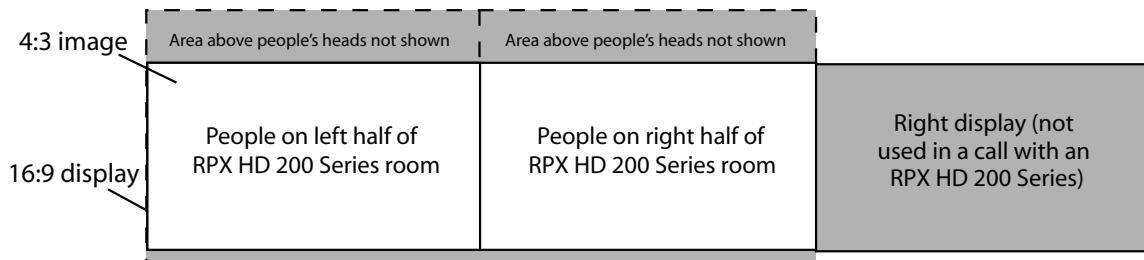
Because different types of video conferencing systems use different aspect ratios for their video images, the OTX automatically adjusts the video for your displays. Most systems use either 4:3 aspect ratio (such as the RPX HD solutions) or 16:9 aspect ratio (such as the OTX and TPX solutions).

For example, if you call a Polycom OTX room from an RPX HD 200 Series suite, the image on the displays in the RPX suite adjusts for the 16:9 OTX room. Therefore, this is what you can expect to see on the displays in the RPX suite:



**Figure 3-1** Example of an Adjusted Display in an RPX Suite

Likewise, in the OTX room, the image automatically adjusts so you see a real-size view of the people in the RPX suite. This is the view in the OTX room:



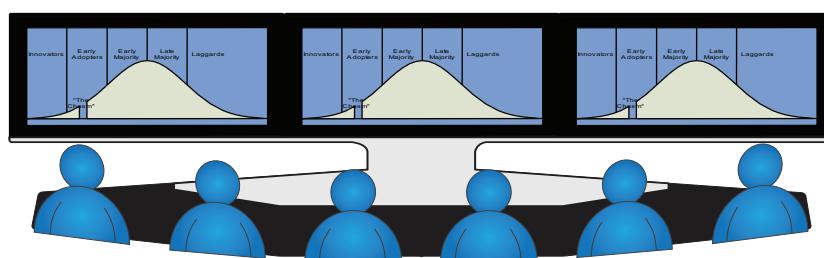
**Figure 3-2** Example of an Adjusted Display in an OTX Room

## Viewing Content

Your OTX enables you to view content (such as slides, spreadsheets, or other documents) during your telepresence conference. You can also receive content from the other site(s) in the conference.

When you display content at your site using a laptop or an optional document camera, or when you receive content from another site, you will see that content on the tabletop content monitors.

If you are using the Polycom OTX room for a regular meeting rather than for a telepresence conference, you can still view content on the content monitors. In addition, you can also view the content on the three displays on the video wall (if your system administrator has configured your system to do so).



**Figure 3-3** Content on Three Displays in an OTX Room

If you show content when you are not in a call and then a call is connected:

- The content on the front displays will be replaced by the video of the people at the far end.
- The content on the tabletop content monitors will stop displaying until new content is displayed.

## Accessing the Content Monitors

In OTX rooms, there are three content monitors located in the table.

Depending on how your system is configured, these three content monitors may automatically lift when content is shared; therefore, be sure to keep the area above the content monitors clear. Once the content monitors are raised, they will remain raised until the end of the call, even if no content is being shown. When the call ends, the content monitors will lower automatically. Also note that, if you are not in a call, content may also appear on the three main display screens as described on [page 3-4](#).

If you want to manually override the automatic feature and freely move the content monitors up and down, you can do so by using the Content Monitor Lift button.

### To access the content monitors:

- 1 Raise the content monitors by pressing the Content Monitor Lift button located on the tabletop in front of each content monitor.
- 2 When you are done using the content monitors, press the Content Monitor Lift button to lower the content monitors.

## Using a Laptop

If you want to share content that is stored on your laptop, you must connect the laptop to the VGA cable. You can access this cable from one of the Collaboration Tanks, which are located between the tabletop content monitors. In addition, your laptop resolution must be supported by your codec.



Because of the OTX high gloss tabletop surface, Polycom recommends that you use a quality optical mouse or trackball with your laptop, such as the Logitech Anywhere Mouse MX™ or equivalent. For more information about the Logitech mouse, refer to <http://www.logitech.com/en-us/mice-pointers/mice/devices/6536>.

## Enhanced User Interface

### To view content with a laptop when you are using the Enhanced UI:

- 1 Access the VGA cable in one of the Collaboration Tanks.
- 2 Connect the VGA cable to the VGA Out connector on your laptop.

Note that some laptops require you to enable VGA output (such as by pressing **Shift-F5**). Refer to your laptop documentation for more information.



Your system administrator may have set up your system so that content automatically displays when you connect a laptop to the VGA cable. If so, you do not need to use the Touch Panel to share content.

**3** Display the content on your laptop screen, and then do one of the following:

- If the laptop is the only content source, touch  **Content** at the top of the Touch Panel screen.
- If there is more than one content source:
  - a Touch  **Content** at the top of the Touch Panel screen.

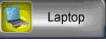
The Content screen for the Enhanced UI appears.



**Figure 3-4** Content Screen — Enhanced UI

**b** Touch  **Laptop**.

The following then occurs:

- If the laptop is the only content source, the color of the  **Content** button changes to blue.
- If there is more than one content source, the color of the  **Laptop** button changes to yellow.
- The content appears on all of the content monitors.

- If the other site in the conference is an RPX HD 400, RPX HD 200, or OTX 300, the content appears on their tabletop content monitors.
- If the other site in the conference is a TPX HD, the content appears on their tabletop content monitors (if their room is equipped with these) and on their auxiliary content monitor (if their room is equipped with one).
- If the other site in the conference uses traditional (standalone) video conferencing equipment, the content appears on their content monitor. If the site has only one display, the content appears on that display.

**4** When you are done using the laptop, do the following:

- If the laptop is the only content source, touch  **Content** at the top of the Touch Panel screen.
- If there is more than one content source, touch  **Laptop** on the Content screen for the Enhanced UI.



**IMPORTANT:** Always disconnect the cable from the laptop when you are done displaying the content so that you do not inadvertently display any private or personal content that may be stored on the laptop.

## Classic User Interface

### To view content with a laptop when you are using the Classic UI:

- 1** Access the VGA cable in one of the Collaboration Tanks.
- 2** Connect the VGA cable to the VGA Out connector on your laptop.  
Note that some laptops require you to enable VGA output (such as by pressing **Shift-F5**). Refer to your laptop documentation for more information.
- 3** Display the content on your laptop screen, and then touch  **Laptop** on the Touch Panel.

The following then occurs:

- The words “Local Content” and “Laptop” on the Touch Panel change from white to yellow:



- The content appears on all of the tabletop content monitors.

- If the other site in the conference is an RPX HD 400, RPX HD 200, or OTX 300, the content appears on their tabletop content monitors.
- If the other site in the conference is a TPX HD, the content appears on their tabletop content monitors (if their room is equipped with these) and on their auxiliary content monitor (if their room is equipped with one).
- If the other site in the conference uses traditional (standalone) video conferencing equipment, the content appears on their content monitor. If the site has only one display, the content appears on that display.

**4** When you are done using the laptop, touch  Laptop on the Touch Panel to stop sending content.



**IMPORTANT:** Always disconnect the cables from the laptop when you are done displaying the content so that you do not inadvertently display any private or personal content that may be stored on the laptop.

## People+Content IP

If you are calling from a remote location and do not have access to a VGA cable, you can use the People+Content IP application to share content on your laptop.

### To share content with a laptop using People+Content IP:

- 1** Download the People+Content IP application from the Polycom website.
- 2** Launch the People+Content IP application.

The People+Content IP application screen appears.



**Figure 3-5** People+Content IP Application Screen

- 3** Enter the Conferencing System IP Address and Meeting Password, if applicable.
- 4** Click Connect.

5 Touch  **Start** to start sharing content.



**Figure 3-6** Start Button on People+Content IP Toolbar

6 Touch  **Zoom** to zoom in on an area of your content.  
 7 Touch  **Stop** to start sharing content.



**Figure 3-7** Stop Button on People+Content IP Toolbar

## Using a Document Camera

If your OTX room is equipped with an optional document camera, you can use that document camera to show content to the other conference participants.

### Enhanced User Interface

#### To view content with a document camera when you are using the Enhanced UI:

- 1 Power on the document camera.
- 2 Touch  **Content** at the top of the Touch Panel screen. (You will see this button only if there is a document camera connected to the system.)  
 The Content screen for the Enhanced UI appears as shown in [Figure 3-4](#) on [page 3-6](#).
- 3 Touch  **Doc Cam**.  
 The color of the  **Doc Cam** button changes to yellow.
- 4 Place your document on the document camera.

The following then occurs:

- The content appears on all of the content monitors.
- If the other site in the conference is an RPX HD 400, RPX HD 200, or OTX 300, the content appears on their tabletop content monitors.
- If the other site in the conference is a TPX HD, the content appears on their tabletop content monitors (if their room is equipped with these) and on their auxiliary content monitor (if their room is equipped with one).

- If the other site in the conference uses traditional (standalone) video conferencing equipment, the document appears on their content monitor. If the site has only one display, the document appears on that display.

**5** When you are done using the document camera, touch  **Doc Cam** to stop sending content.

## Classic User Interface

**To view content with a document camera when you are using the Classic UI:**

- 1** Power on the document camera.
- 2** Touch  **Doc Cam** on the Touch Panel. (Note that the icon label depends on what your system administrator chose as the label name.)
- 3** Place your document on the document camera.

The following then occurs:

- The words “Local Content” and “Doc Cam” on the Touch Panel change from white to yellow:



- The content appears on all of the content monitors.
- If the other site in the conference is an RPX HD 400, RPX HD 200, or OTX 300, the content appears on their tabletop content monitors.
- If the other site in the conference is a TPX HD, the content appears on their tabletop content monitors (if their room is equipped with these) and on their auxiliary content monitor (if their room is equipped with one).
- If the other site in the conference uses traditional (standalone) video conferencing equipment, the document appears on their content monitor. If the site has only one display, the document appears on that display.

**4** When you are done using the document camera, touch  **Doc Cam** to stop sending content. (Note that the icon label depends on what your system administrator chose as the label name.)

# Conducting Successful Meetings

Conducting a successful meeting in an OTX room is easy. Because you don't have to manage cameras, microphones, speakers, remote controls, and other equipment, you can be free to concentrate on making your meeting as effective as possible.

## Meeting Tips

This section provides you with tips on how to take full advantage of the extraordinary video and audio in the room, and provides information that you should know if you are the meeting coordinator.

### Video Tips

Polycom OTX cameras are located under the camera shroud above the center display. To achieve the best video from the cameras:

- Do not sit in front of the table seams. If you do, your image will look "split" to the far-site participants. You can be sure to avoid the seams by sitting in one of the designated seating locations.
- Avoid repetitive motions that may distract other participants, such as tapping your pen or fingers on the tabletop. Remember that, in telepresence conferences, all movements, expressions, and gestures are visible to everyone in the meeting.

### Audio Tips

Polycom's superior audio and digital Ceiling Microphone Arrays are extremely sensitive. Keep in mind that they will pick up all sound in the room, even gentle noises and whispers — and even if you are not in camera range.

Other helpful audio tips you should consider include:

- When speaking, you do not have to direct your speech to a certain location or speak louder than normal. Simply speak in your normal tone of voice.
- As in any meeting, you should refrain from sidebar conversations. These can be distracting, especially in multipoint meetings where participants at a number of sites are present.
- Whenever you are in an OTX room, remember that the microphones may be on. If you want to have a private conversation, check that the microphones are muted.

## Document Camera Tips

If your OTX is equipped with an optional document camera, you may find these tips helpful:

- If your room does not have a whiteboard, you can annotate on a document that you display using your document camera.
- When writing on a document, use a black marker or a dark pen so that your notations show more clearly.

## Meeting Coordinator Tips

When coordinating video meetings in a Polycom OTX room, you perform many of the same tasks as you would when you coordinate any other meeting. For example, you should try to begin and end your meeting on time and you may want to prepare an agenda.

As the meeting coordinator in a Polycom OTX room, follow these additional guidelines:

- If you are going to show content, check your laptop and ensure that your sound, graphics, video clips, or complicated graphic presentations work properly.
- Arrive early to ensure that the room is ready to go and, if any room adjustments are necessary, they can be made prior to the meeting.
- Ask the primary participants in the video meeting to sit at the center seats at the table.
- If your organization has signed up for Video Network Operations Center (VNOC) services, you should typically inform the VNOC whenever you want to extend a meeting, cancel a meeting, or end a meeting early.

## Reserving a Polycom OTX Room

In some organizations, you can use a Polycom OTX room at any time, whereas at other organizations, you must reserve the room.

When reserving an OTX room, keep these guidelines in mind:

- If your organization has signed up for VNOC services, you can typically make your room reservation through the VNOC. The operators there will not only help you make a reservation, but they will also monitor the network and resources during the meeting, and provide remote site management to make sure your meeting runs as you planned.
- Whenever you schedule a telepresence conference, consider time zone differences for the various participants.
- If you want to schedule a conference with a video conferencing site that does not have Polycom OTX, RPX, or TPX equipment, your system administrator or the VNOC must ensure that the site's equipment is compatible with the equipment in the OTX room.



The following steps provide a general guideline for requesting a reservation. Your organization's protocol may require you to veer slightly from these steps or to perform additional steps.

### To request a reservation:

- 1 Some organizations have reservation forms used to collect the information needed to schedule and set up telepresence conferences. If your organization has one of these forms, fill it out before you proceed to step 2.
- 2 Do one of the following:
  - Touch  Help Desk on the Touch Panel, and then touch the larger  Help Desk button that appears.
  - If you have VNOC services, call the VNOC directly using the phone number or email address provided by your organization.
- 3 Schedule your reservation with the Help Desk or the VNOC operator.

Typically, the operator will then:

- Ensure that all the other sites in your telepresence conference have the same reservation.
- Email a confirmation of the reservation to you and the contacts at the other sites.







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